
Kanban Task Manager SharePoint for Add-in – Manual

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1 INTRODUCTION

Kanban Task Manager SharePoint Add-in helps a workgroup cooperate on projects and tasks in SharePoint. The add-in visualizes the workflow and makes it easy to manage projects.

The SharePoint versions of *Kanban Task Manager* are especially suitable for users who need to reach the tasks from anywhere and for managers who supervise several workgroups.

Kanban Task Manager SharePoint Add-in is installed from SharePoint Store to the site where it should be used.

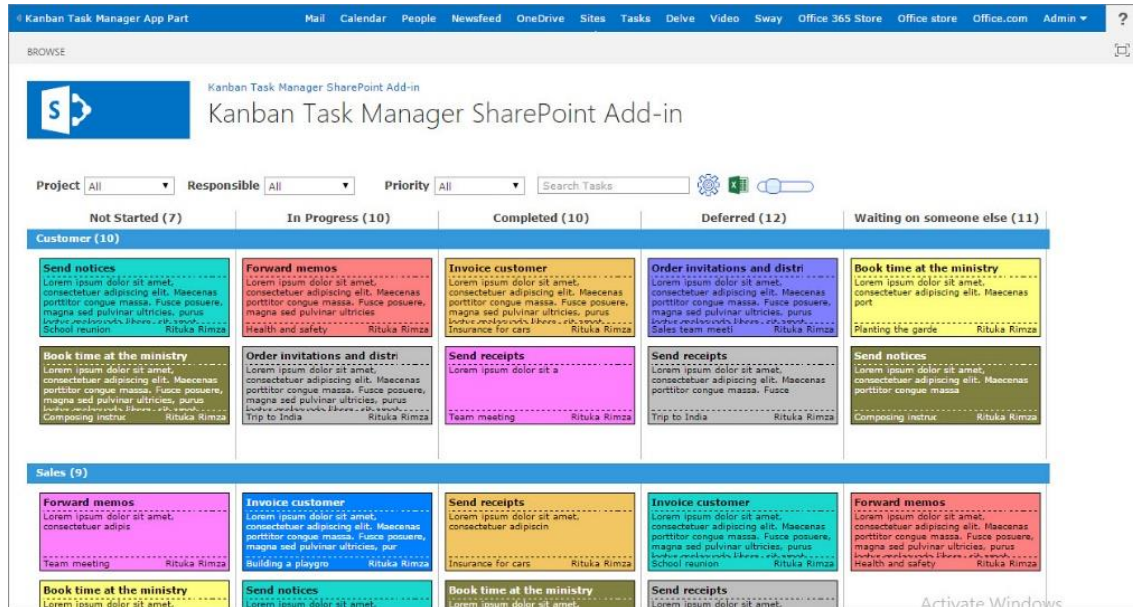
The traditional kanban board uses cards that tell what and how much should be produced and when it should be done. When managers get such a visual picture of the work process, they can quickly reveal bottlenecks and blockers. Less time is spent on trying to sort out how projects are coming along, because everything is visible on the kanban board.

Working in kanban style with tasks in SharePoint gives you everything in the computer, and on top of that the developers of kalmstrom.com Business Solutions have added several useful features:

- **Drag and drop tasks** within or between phases and lanes.
- **Filter** tasks by project, responsible and/or priority and if enabled also by a custom value.
- **Search** of task subjects and body texts.
- Display of tasks for **multiple projects** in one Kanban board.
- Possibility to create **swim lanes**.
- **WIP limits** gives a warning when there are too many tasks.
- **Excel reports** that show statistics on the task management.

Section 7 of this manual is intended for all users, while the rest is meant for the administrator.

Microsoft plans to replace the word “app” with “add-in”. In this manual we are talking about the *Kanban Task Manager Add-in* and App Part, so we are using the new term in the product name but the old term for app part/add-in part.



1.1 LANGUAGES

The language of *Kanban Task Manager SharePoint Add-in* is automatically set to the same as on the SharePoint site. The supported languages are: Danish, Dutch, English, French, German, Italian, Norwegian, Portuguese, Spanish and Swedish.

1.2 REQUIREMENTS

To use *Kanban Task Manager SharePoint Add-in* you need to have SharePoint 2013 (in-house or hosted) or Office 365 SharePoint Online.

Supported browsers are Microsoft Edge, Internet Explorer 9 and higher and the latest versions of Google Chrome and Mozilla Firefox.

2 DOWNLOAD KANBAN TASK MANAGER SHAREPOINT ADD-IN

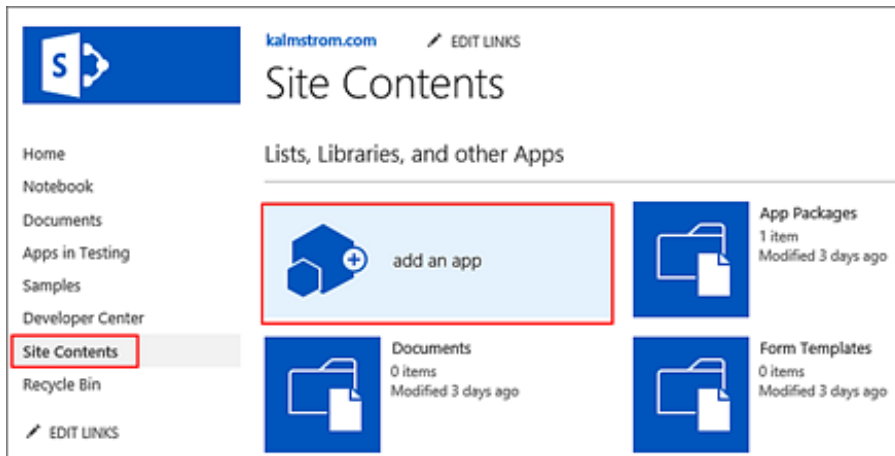
Kanban Task Manager SharePoint Add-in can be downloaded from SharePoint Store or from the kalmstrom.com website.

2.1 DOWNLOAD FROM SHAREPOINT STORE

NOTE: *Kanban Task Manager SharePoint Add-in* has not yet been added to SharePoint Store, so currently the only possibility is to download from the kalmstrom.com website, see below.

Go to the SharePoint site where you want to use *Kanban Task Manager SharePoint Add-in* and click on **Site Contents**.

Under Site Contents click on **add an app**.



Click on **SharePoint Store** in the left panel and select *Kanban Task Manager SharePoint Add-in*.

2.2 DOWNLOAD FROM KALMSTROM.COM

You can also download *Kanban Task Manager SharePoint Add-in* directly [from the kalmstrom.com website](http://www.kalmstrom.com) to your PC and then upload the add-in to the Add-in catalog of the SharePoint site collection where you want to use *Kanban Task Manager*.

Install *Kanban Task Manager SharePoint Add-in* on a site by going into **Site Contents** and **add an app**, as described under Download from SharePoint Store. Select 'Apps You Can Add' and choose *Kanban Task Manager SharePoint Add-in*.

2.3 PERMISSIONS

Standard SharePoint permissions are used for the *Kanban Task Manager SharePoint Add-in* lists. The permission for the Add-in itself is set automatically when the download is trusted.

2.3.1 ADD-IN

Kanban Task Manager SharePoint Add-in needs Manage permission on the site collection where it is installed. Thanks to this permission restriction, the *Kanban Task Manager SharePoint Add-in* cannot make any other changes on the SharePoint site collection than the ones needed for the add-in to work, no matter what permission the user has.

Kanban Task Manager SharePoint Add-in sets the required add-in permission when you have clicked on the Trust-it button during the installation.

2.3.2 USERS

People who should work with tasks must have at least **Contribute** permission over the *Kanban Task Manager SharePoint Add-in* Task list.

2.3.3 ADMINISTRATOR

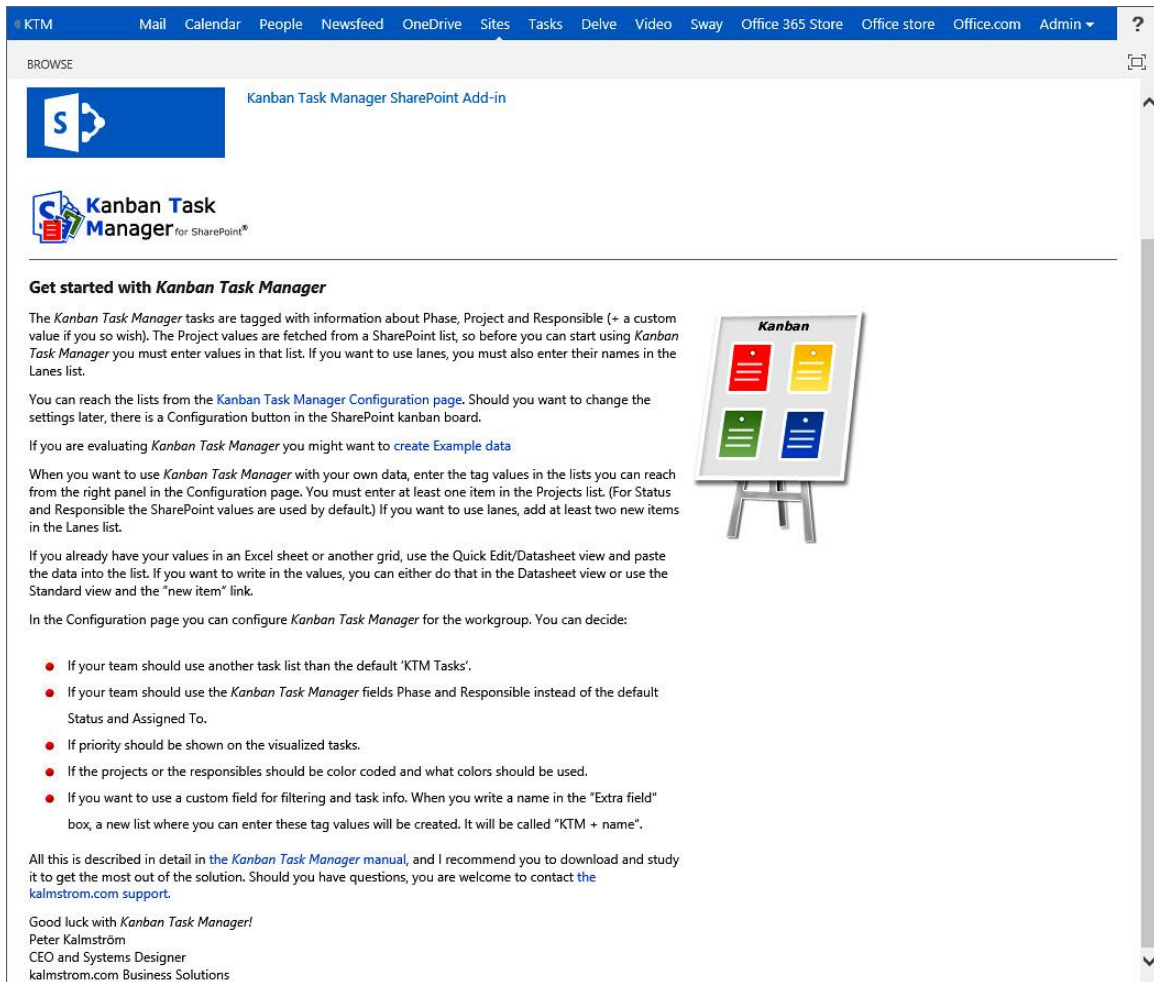
The *Kanban Task Manager SharePoint Add-in* administrator must have **Full control** over the **site** where *Kanban Task Manager SharePoint Add-in* is installed.

2.3.4 VISITORS

For people who just need to see the task it is sufficient with **Read** permission over the *Kanban Task Manager SharePoint Add-in* Task list. Visitors will not be able to modify or add tasks, but they will be able to review the tasks in both the standard list and on the kanban board page.

3 FIRST TIME USAGE

When *Kanban Task Manager SharePoint Add-in* has been installed in a site collection, a “Get Started” page will be shown when you click on “Kanban Task Manager SharePoint Add-in” in the Site Contents.



• KTM Mail Calendar People Newsfeed OneDrive Sites Tasks Delve Video Sway Office 365 Store Office store Office.com Admin ?

BROWSE

 Kanban Task Manager SharePoint Add-in



Get started with *Kanban Task Manager*

The *Kanban Task Manager* tasks are tagged with information about Phase, Project and Responsible (+ a custom value if you so wish). The Project values are fetched from a SharePoint list, so before you can start using *Kanban Task Manager* you must enter values in that list. If you want to use lanes, you must also enter their names in the Lanes list.

You can reach the lists from the [Kanban Task Manager Configuration page](#). Should you want to change the settings later, there is a Configuration button in the SharePoint kanban board.

If you are evaluating *Kanban Task Manager* you might want to [create Example data](#)

When you want to use *Kanban Task Manager* with your own data, enter the tag values in the lists you can reach from the right panel in the Configuration page. You must enter at least one item in the Projects list. (For Status and Responsible the SharePoint values are used by default.) If you want to use lanes, add at least two new items in the Lanes list.

If you already have your values in an Excel sheet or another grid, use the Quick Edit/Datasheet view and paste the data into the list. If you want to write in the values, you can either do that in the Datasheet view or use the Standard view and the “new item” link.

In the Configuration page you can configure *Kanban Task Manager* for the workgroup. You can decide:

- If your team should use another task list than the default ‘KTM Tasks’.
- If your team should use the *Kanban Task Manager* fields Phase and Responsible instead of the default Status and Assigned To.
- If priority should be shown on the visualized tasks.
- If the projects or the responsables should be color coded and what colors should be used.
- If you want to use a custom field for filtering and task info. When you write a name in the “Extra field” box, a new list where you can enter these tag values will be created. It will be called “KTM + name”.

All this is described in detail in the [Kanban Task Manager manual](#), and I recommend you to download and study it to get the most out of the solution. Should you have questions, you are welcome to contact [the kalmstrom.com support](#).

Good luck with *Kanban Task Manager*!
Peter Kalmström
CEO and Systems Designer
[kalmstrom.com Business Solutions](#)



From the “Get Started” page you can either add your own list data or generate Example data. You can also reach the Manual web page, to download this manual.

3.1 EXAMPLE DATA

If you choose to first generate Example data for the evaluation, click on the 'create Example data' link in the "Get Started" page.

The screenshot shows the 'Kanban Task Manager Example data' configuration page. It includes a top navigation bar with links like 'Kanban Task Manager App Part', 'Mail', 'Calendar', etc. The main content area is titled 'Kanban Task Manager Example data' and contains three sections: 'Projects', 'Lanes', and 'Body'. Each section has a text input field for example data. The 'Projects' field contains a list of tasks like 'Planting the garden', 'Building a playground', etc. The 'Lanes' field contains 'Customer, Sales, Contracts, Legal, Fulfillment'. The 'Body' field contains Lorem ipsum text. Below these fields is a 'Subjects' section with a text input field. At the bottom left, there is a dropdown menu with values 50, 20, 50, 100, 500, 1000. At the bottom right, there are 'OK' and 'Cancel' buttons. A watermark 'Activate Windows Go to Settings to activate Windows' is visible in the bottom right corner.

Example data is created for projects, lanes and tasks. The phases are the SharePoint built-in status options, which are used by default by *Kanban Task Manager SharePoint Add-in*. Refer to Phases section.

The responsible persons are added to *Kanban Task Manager SharePoint Add-in* from the user accounts when they are assigned as responsible for tasks. As no other user than the admin data is created, all the example data tasks will be assigned to this admin.

When you create Example data, you will have to remove them before you start using *Kanban Task Manager SharePoint Add-in* with your own data. To remove the Example data, delete all data in the lists KTM Tasks, KTM Projects and KTM Lanes. This is quickly done if you use the datasheet view for each list.

4 THE CONFIGURATION PAGE

The Configuration page is opened from the kanban board. (At First Time Usage the Configure page is instead reached from the Get Started page, as no kanban board has yet been created.)

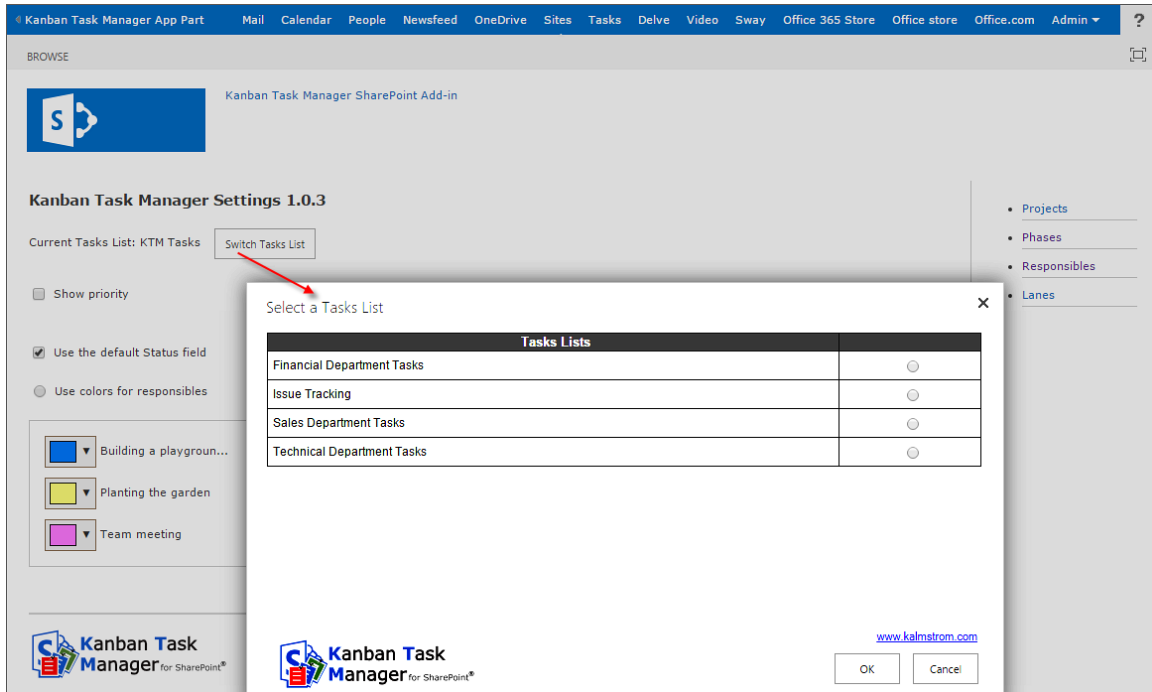
The screenshot shows the Kanban Task Manager SharePoint Add-in interface. At the top, there's a navigation bar with links like Mail, Calendar, People, Newsfeed, OneDrive, Sites, Tasks, Delve, Video, Sway, Office 365 Store, Office store, Office.com, and Admin. Below this, the main header says 'Kanban Task Manager SharePoint Add-in'. The interface features a search bar and filters for Project, Responsible, and Priority. The tasks are organized into columns based on their status: Not Started (7), In Progress (10), Completed (10), Deferred (12), and Waiting on someone else (11). Each task card displays a title, a brief description, and the assigned responsible person. A red arrow points to a gear icon in the top right corner of the task list area.

In the Configure page the admin specifies how the kanban board and the tasks visualized there should look. Click OK to confirm your selection or Cancel to abort it.

The screenshot shows the 'Kanban Task Manager Settings 1.0.3' configuration page. It includes a 'Current Tasks List' section with a dropdown set to 'KTM Tasks' and a 'Switch Tasks List' button. Below this are several checkboxes: 'Show priority' (unchecked), 'Use the default Status field' (checked), 'Use colors for responsables' (unchecked), and 'Use the default Assign To field' (checked). There is also an 'Extra field' input box. At the bottom, there's a color selection grid with various colored squares and corresponding task names like 'Building a playground...', 'Composing instructio...', 'Health and safety pr...', 'Insurance for cars', 'Planting the garden', 'Sales team meeting', 'School reunion', 'Staff training day', 'Team meeting', and 'Trip to India'. The page also features a 'Clear cache' button and 'OK'/'Cancel' buttons at the bottom right.

4.1 TASKS LIST

The default tasks list is a custom *Kanban Task Manager SharePoint Add-in* list named 'KTM Tasks', but you can change that and use another tasks list. Click on the button 'Switch Tasks List' to open a dialog where all your tasks lists are displayed. Select the radio button for the list you want to use for the *Kanban Task Manager SharePoint Add-in* tasks.



4.1 SHOW PRIORITY

Check the box for “Show priority” if you want the priority value to be shown on the visualized tasks.

4.2 CUSTOM FIELD

In the Extra field you can enter any parameter that you would like to be added to the visualized tasks and that you want to filter the tasks by on the kanban board.

When you enter a name in this field, a list for the values of the custom parameter will be added to *Kanban Task Manager SharePoint Add-in*. Add your own values in the list, so that users can select them for each task.

The custom field value will be added above the responsible value on the visualized task.

In the image here to the right, the organization has opted to use the parameter “Weight” and to set the values to 1–10. (They have also opted to show Priority in the task.)

Extra field

Invoice customer
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna
(2) Normal
Health and safety Arpeet Gujarati

Above the tasks on the kanban board there will also be a new dropdown for filtering the custom field.

Send receipts
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero
(2) Normal
School reunion Arpeet Gujarati

Project	All ▼	Responsible	All ▼	Weight	All ▼	Priority	All ▼
---------	-------	-------------	-------	--------	-------	----------	-------

If you want to change the name of the custom field, write another name in the field on the Configure page (and change the values in the list if needed). If you want to remove the field, remove the text in the field.

4.3 STATUS/PHASE

The different phases in the work process are by default defined with the SharePoint Status field for the tasks list you are using with *Kanban Task Manager SharePoint Add-in*, refer to Status.

Uncheck the box if you want to use the custom *Kanban Task Manager* list 'KTM Phases' instead, refer to KTM Phases. Click OK to save your change and enter your values in the 'KTM Phases' list.

4.4 ASSIGNED TO/RESPONSIBLE

The person who should be responsible for each task is by default fetched from the SharePoint accounts in the Assigned To field for each task, refer to Assigned To.

Uncheck the box if you want to use the custom *Kanban Task Manager SharePoint Add-in* list 'KTM Responsibles' for the responsible persons, refer to KTM Responsibles. Click OK to save your change and enter the names of the team members in the 'KTM Responsibles' list.

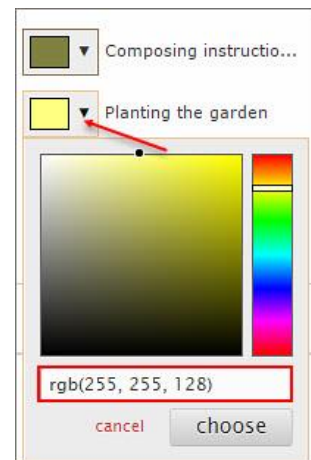
4.5 COLORS

By default the color codes are used for projects, but you may also let each responsible person has his/her own color. You can change the default colors to other colors in the RGB range.

☐ Use colors for responsables	☒ Use colors for projects
---	--

If you prefer to write or paste the color codes, you can do that in the 'KTM Projects' list.

If you use the default setting for responsables you can only change the colors in the Configuration page. If you use the 'KTM Responsibles' list you can to write or paste the color codes for each item.



A color selection dialog box with a title bar. It contains a color picker with a gradient and a vertical color bar. A red arrow points to a yellow color swatch. Below the picker is a text input field containing 'rgb(255, 255, 128)' and two buttons: 'cancel' and 'choose'.

4.6 CLEAR CACHE

To increase performance *Kanban Task Manager SharePoint Add-in* saves a cache of all the current tasks. Sometimes this cache gets corrupt. If that happens once, click this button to resolve the problem. If it happens often, please [contact the kalmstrom.com support!](http://www.kalmstrom.com)

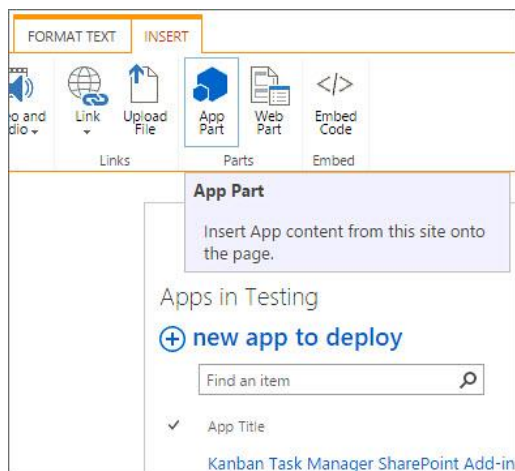


5 THE KANBAN TASK MANAGER APP PART

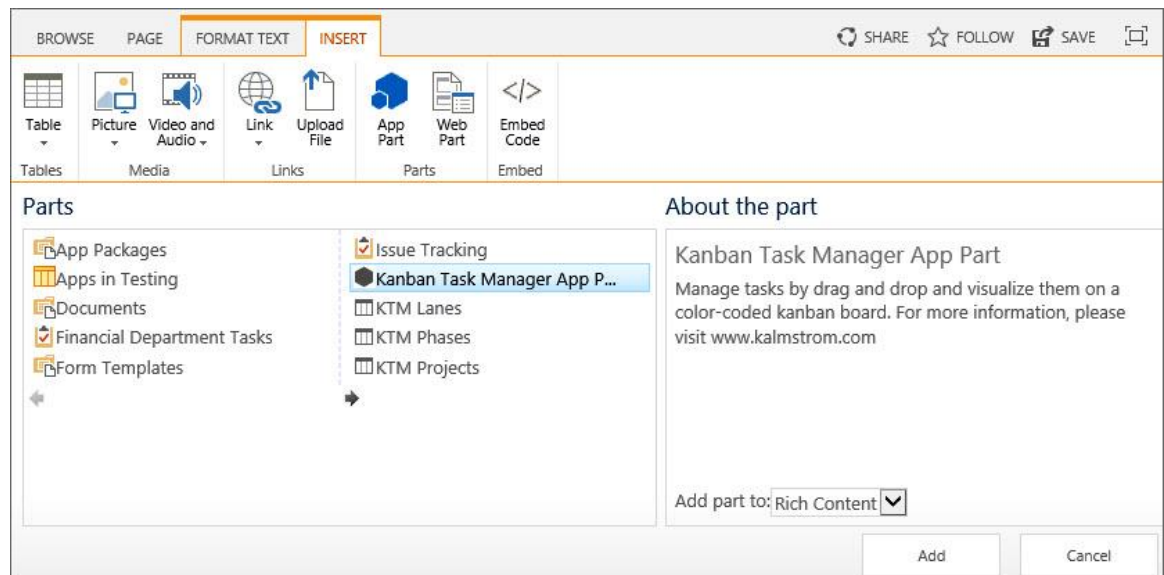
When the *Kanban Task Manager* Add-in has been configured, the *Kanban Task Manager* App Part can be added to any page in the site. The App Part shows the same kanban board with the same tasks as the Add-in, and tasks can be created or edited in either the Add-in or the App Part. Attachments and inline images are supported in the App Part but not in the Add-in.

5.1 ADD APP PART

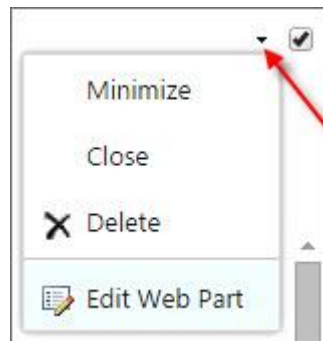
1. Click on 'Edit' on the top right of the SharePoint page where you want to add the app part. The page will open in Edit mode.
2. Open the INSERT tab and click on 'App Part'.



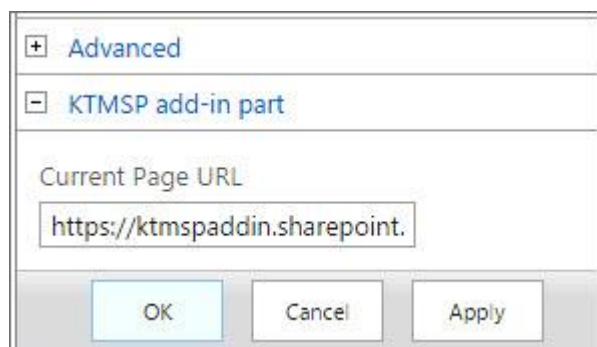
3. Under Parts select 'Kanban Task Manager App Part'.
4. Click on 'Add'.



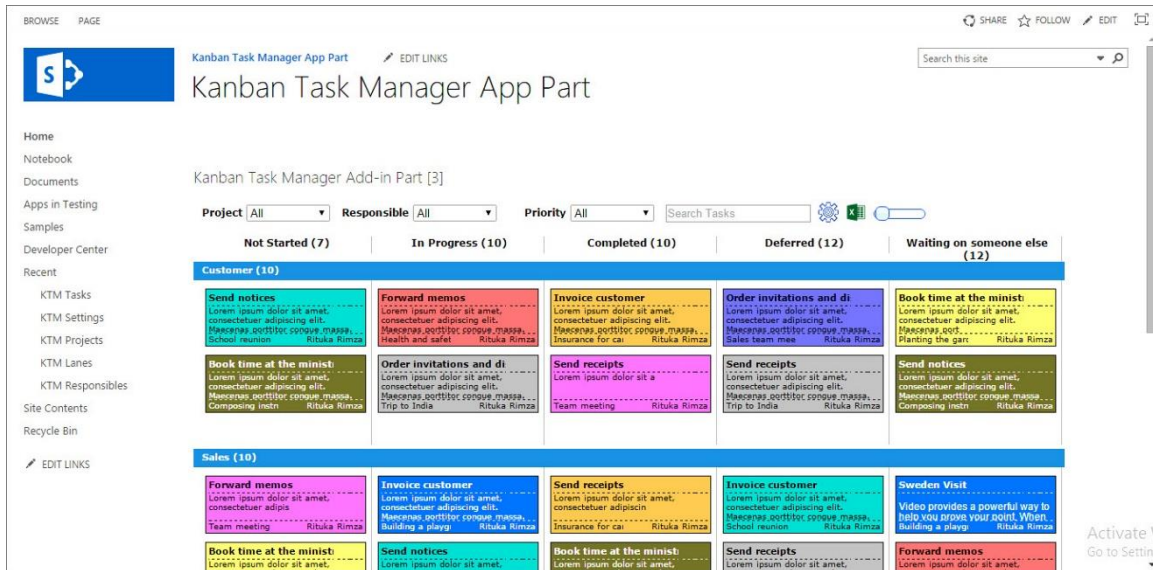
5. Move the cursor over the top right corner of the app part. Expand the accordion and click on 'Edit Web Part'.



6. Expand the section 'KTMSP App Part' and enter the URL of the current page, where you have added the App Part.
7. Click on 'Apply' and then save the page.



8. Now the kanban board will be added to the page.



6 SHAREPOINT LISTS AND FIELDS

The *Kanban Task Manager SharePoint Add-in* lists are standard SharePoint lists, so you can treat them like you treat any other lists in SharePoint. *Kanban Task Manager SharePoint Add-in* will check if all needed lists and columns are in place and give a warning in case you should make changes in a way that will harm the function of *Kanban Task Manager SharePoint Add-in*.

Kanban Task Manager SharePoint Add-in creates the lists 'KTM Tasks', 'KTM Phases', 'KTM Projects', 'KTM Responsibles' and 'KTM Lanes'. If you enter a name in the Extra field box in the Configure page, *Kanban Task Manager SharePoint Add-in* also creates a list for values of the extra tag that you can add to the tasks and the kanban board filter.

However, only the 'KTM Tasks' list and the 'KTM Projects' lists must be used for *Kanban Task Manager SharePoint Add-in* to work.

By default *Kanban Task Manager SharePoint Add-in* does *not* use the lists 'KTM Phases' and 'KTM Responsibles'. Instead the SharePoint built-in task fields 'Status' and 'Assigned To' are used for these tags.

The list 'KTM Lanes' will be used if it has at least two values. If the list has one or no value, the kanban board will not have any lanes.

6.1 SHAREPOINT FIELDS

6.1.1 STATUS

When you first click on the Phases link in the *Kanban Task Manager SharePoint add-in* Configuration page, a dialog filled out with the built-in SharePoint task options for Status will open. In this dialog you can hide phases, for example the Completed phase, decide the order of the phases and set a limit for the allowed number of tasks (WIP).

Phases ✕

Phase Name	Move closed tasks to this phase	Hide	Sequence	WIP	Delete
Not Started	☐	☐	0	0	✕
In Progress	☐	☐	0	0	✕
Completed	☐	☐	0	0	✕
Deferred	☐	☐	0	0	✕
Waiting on someone else	☐	☐	0	0	✕

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SharePoint gives the Status options Not Started, In Progress, Completed, Deferred and Waiting on someone else. To edit these options, write in your preferred phase names in the grid. You can also add or remove phase names here. All changes will be reflected back to the kanban board.

6.1.2 ASSIGNED TO

When you create a new task, your own name will be suggested in the 'Assigned To' field. To change the name, write the first letter of the name of the new responsible in the field. Then SharePoint will suggest names from the user accounts.

The name you select will be entered in the Responsibles dialog, if it is not already present there.

If this person should leave the workgroup the name can be hidden from the filter dropdown in the kanban board. You may also remove the name from the Responsibles dialog.

Either you hide or remove the name, it will not show up in the kanban board filter dropdown. However, as long as the user is added to SharePoint, the name will be suggested when you enter a responsible in the open task.

Responsibles ✕

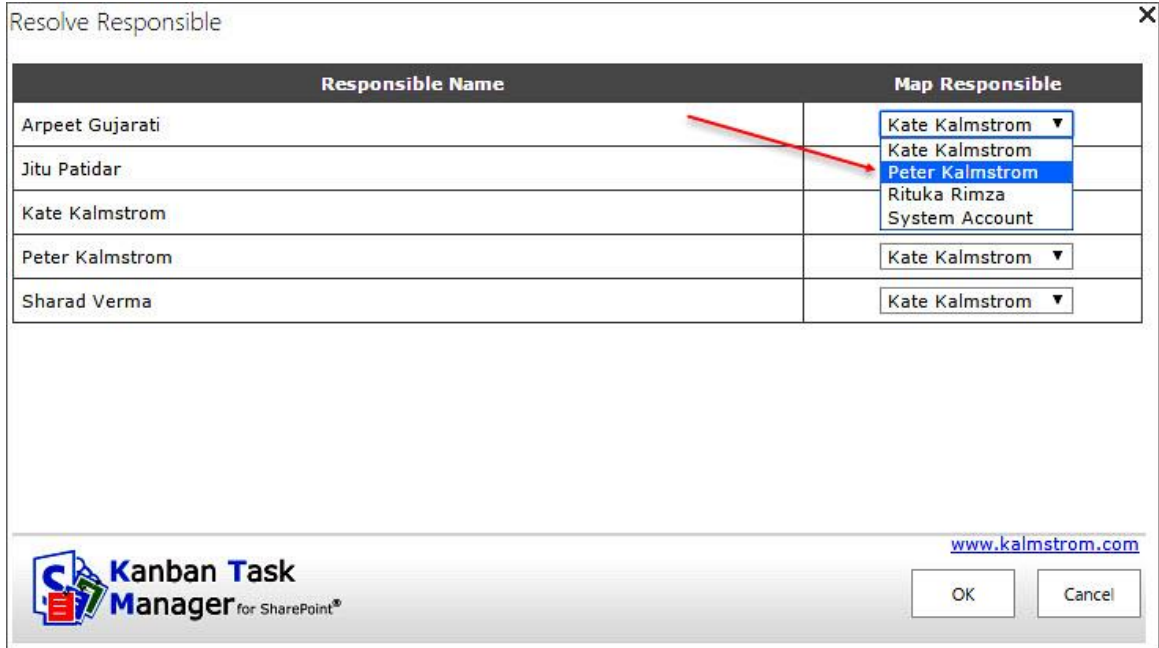
Responsible Name	Hide
Kate Kalmstrom	☐
Peter Kalmstrom	☐
Rituka Rimza	☒

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6.1.3 MAP RESPONSIBLE

By default the responsible names are fetched from the SharePoint user accounts, but *Kanban Task Manager SharePoint Add-in* has an option to instead fetch the names from a custom list, 'KTM Responsibles'. When you switch between these two options, from the default option to the custom list or vice versa, a dialog will be displayed.

Here you can map the former responsables with the new ones, so that all current tasks will have the correct responsible even if you change the way *Kanban Task Manager* fetches them.



The dialog box titled "Resolve Responsible" contains a table with two columns: "Responsible Name" and "Map Responsible". The table lists five names: Arpeet Gujarati, Jitu Patidar, Kate Kalmstrom, Peter Kalmstrom, and Sharad Verma. For each name, there is a dropdown menu in the "Map Responsible" column. A red arrow points from the "Arpeet Gujarati" row to the "Map Responsible" dropdown, which is currently open, showing a list of names: Kate Kalmstrom, Kate Kalmstrom, Peter Kalmstrom, Rituka Rimza, and System Account. The "Peter Kalmstrom" option is highlighted. At the bottom of the dialog, there is a logo for "Kanban Task Manager for SharePoint", the website "www.kalmstrom.com", and "OK" and "Cancel" buttons.

Responsible Name	Map Responsible
Arpeet Gujarati	Kate Kalmstrom ▼
Jitu Patidar	Kate Kalmstrom
Kate Kalmstrom	Peter Kalmstrom
Peter Kalmstrom	Rituka Rimza
Sharad Verma	System Account

 **Kanban Task Manager** for SharePoint® www.kalmstrom.com OK Cancel

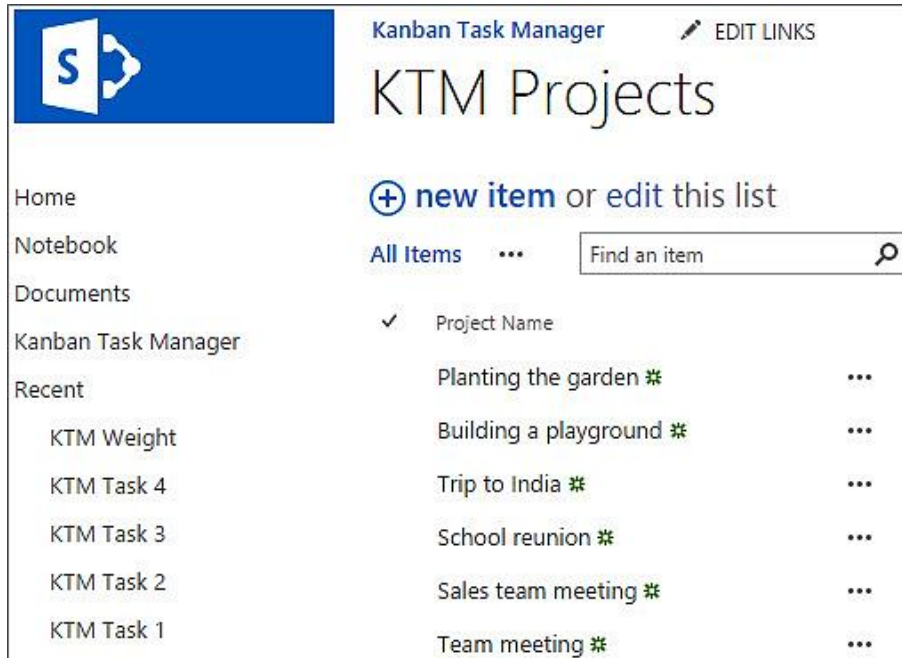
6.2 LISTS

The *Kanban Task Manager SharePoint Add-in* Configure page always has links to the 'KTM Projects' and 'KTM Lanes' lists. If you do *not* use the default settings for phases and responsables, the Configure page also has links to the lists 'KTM Phases' and 'KTM Responsibles'. (By default the Phases and Responsible links open dialogs, not lists, see above.)

You can also reach these lists via the SharePoint Site Contents (or via the "Get Started" page, refer to First Time Usage).

6.2.1 KTM PROJECTS

In the 'KTM Projects' list all the workgroup's projects are stored and shared.



Kanban Task Manager EDIT LINKS

KTM Projects

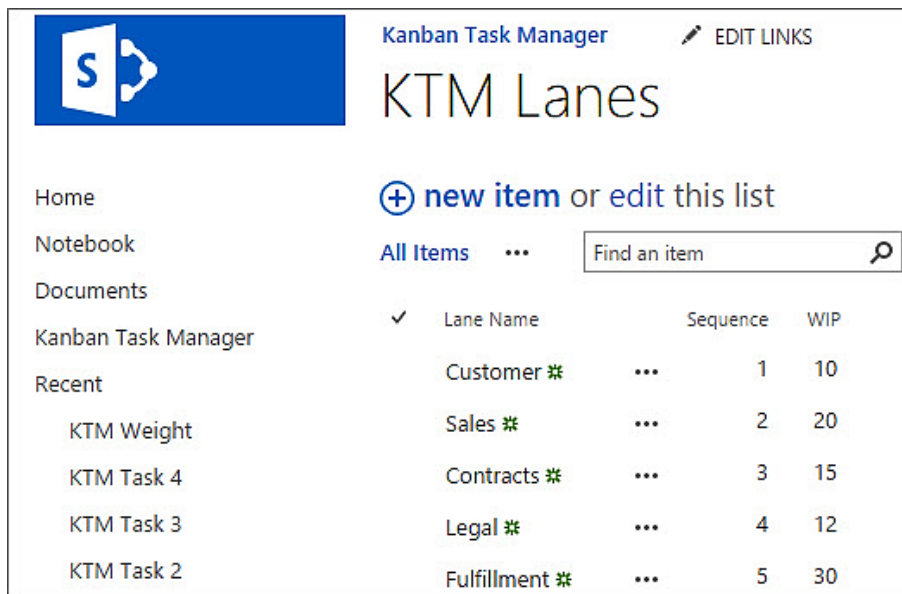
+ new item or edit this list

All Items ... Find an item

✓	Project Name	
	Planting the garden	...
	Building a playground	...
	Trip to India	...
	School reunion	...
	Sales team meeting	...
	Team meeting	...

6.2.2 KTM LANES

The 'KTM Lanes' list does not have to be used, but if you want to group the tasks on the kanban board in swim lanes, create at least two items in this list. Add a sequence number to get them in the correct order.



Kanban Task Manager EDIT LINKS

KTM Lanes

+ new item or edit this list

All Items ... Find an item

✓	Lane Name	Sequence	WIP
	Customer	...	1 10
	Sales	...	2 20
	Contracts	...	3 15
	Legal	...	4 12
	Fulfillment	...	5 30

6.2.3 KTM PHASES

By default *Kanban Task Manager SharePoint Add-in* uses the standard SharePoint task field 'Status' for the phase names. When you use the default setting and click on the 'Phases' link in the Configure page, you will be directed to a dialog and not to a list, *refer to Status/Phase*.

However, *Kanban Task Manager SharePoint Add-in* also has a custom list for phases, 'KTM Phases'. When you have unchecked the default option, the Phases link in the Configure page will instead direct you to that custom list.

Enter the phase names you want to use in the 'KTM Phases' list, and they will be displayed on the kanban board.

6.2.4 KTM RESPONSIBLES

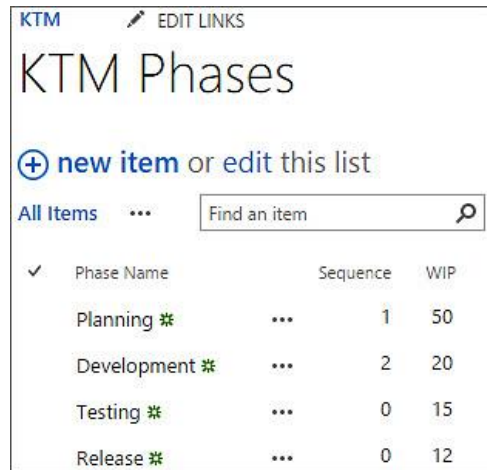
By default *Kanban Task Manager SharePoint Add-in* uses the SharePoint user accounts to populate the task field Assigned To.

However, *Kanban Task Manager SharePoint Add-in* also has custom lists for responsables, 'KTM Responsibles'. When you have unchecked the default option, the Responsibles link in the Configure page will instead direct you to that custom list.

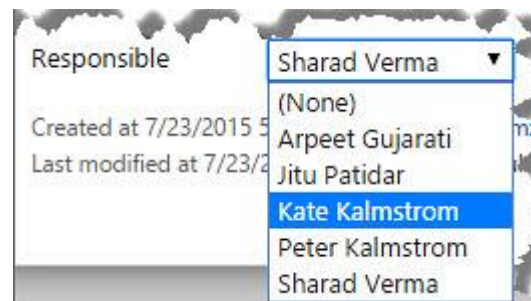
Enter the names of the workgroup members in the 'KTM Responsibles' list, and these names will be shown in a dropdown in the tasks. There you can select the responsible for each task.

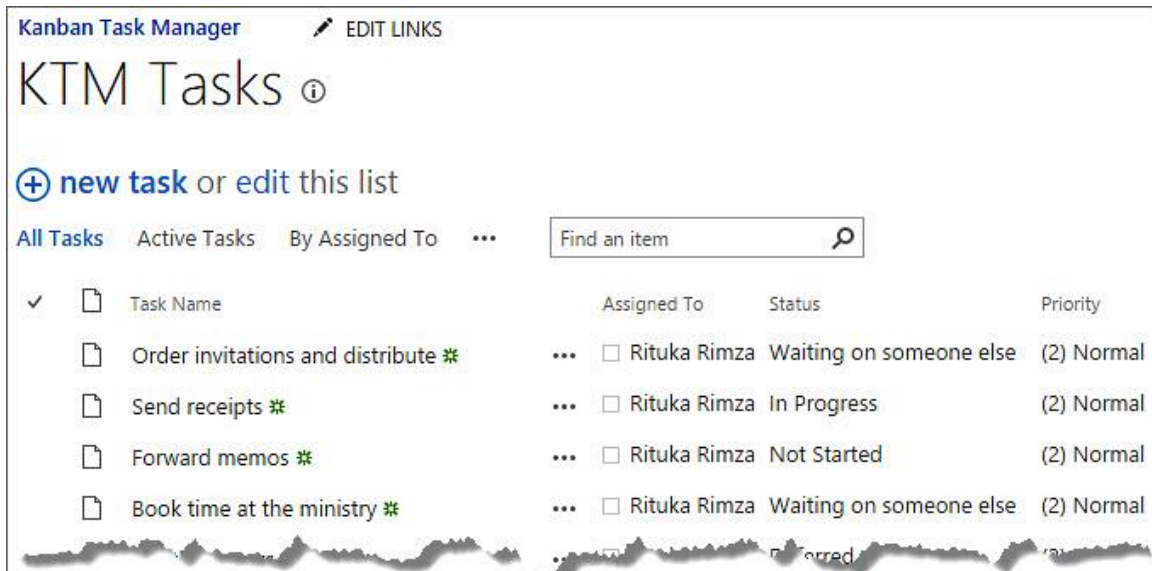
6.2.5 THE KTM TASKS LIST

By default the tasks are saved in a list called 'KTM Tasks'. (In the Configure page you may choose to use another SharePoint tasks list with *Kanban Task Manager SharePoint Add-in*, *refer to Tasks List*.)



✓	Phase Name	Sequence	WIP
	Planning *	1	50
	Development *	2	20
	Testing *	0	15
	Release *	0	12





6.2.5.1 TEXT TYPE

The text type of the description field in the 'KTM Tasks' list is by default set to Enhanced rich text:

Description:

Require that this column contains information:

☐ Yes ☒ No

Number of lines for editing:

6

Specify the type of text to allow:

☐ Plain text

☐ Rich text (Bold, italics, text alignment, hyperlinks)

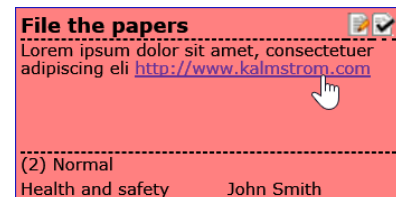
☒ Enhanced rich text (Rich text with pictures, tables, and hyperlinks)

Append Changes to Existing Text

☐ Yes ☒ No

With the Enhanced rich text option selected, the users get more possibilities and can insert images and tables in the tasks.

Enhanced rich text will also make links in the description field clickable directly on the kanban card.



Should you want to give less formatting possibilities, change into the Rich text option, and if you do not want to give any formatting options at all, select the Plain text option.

Note:

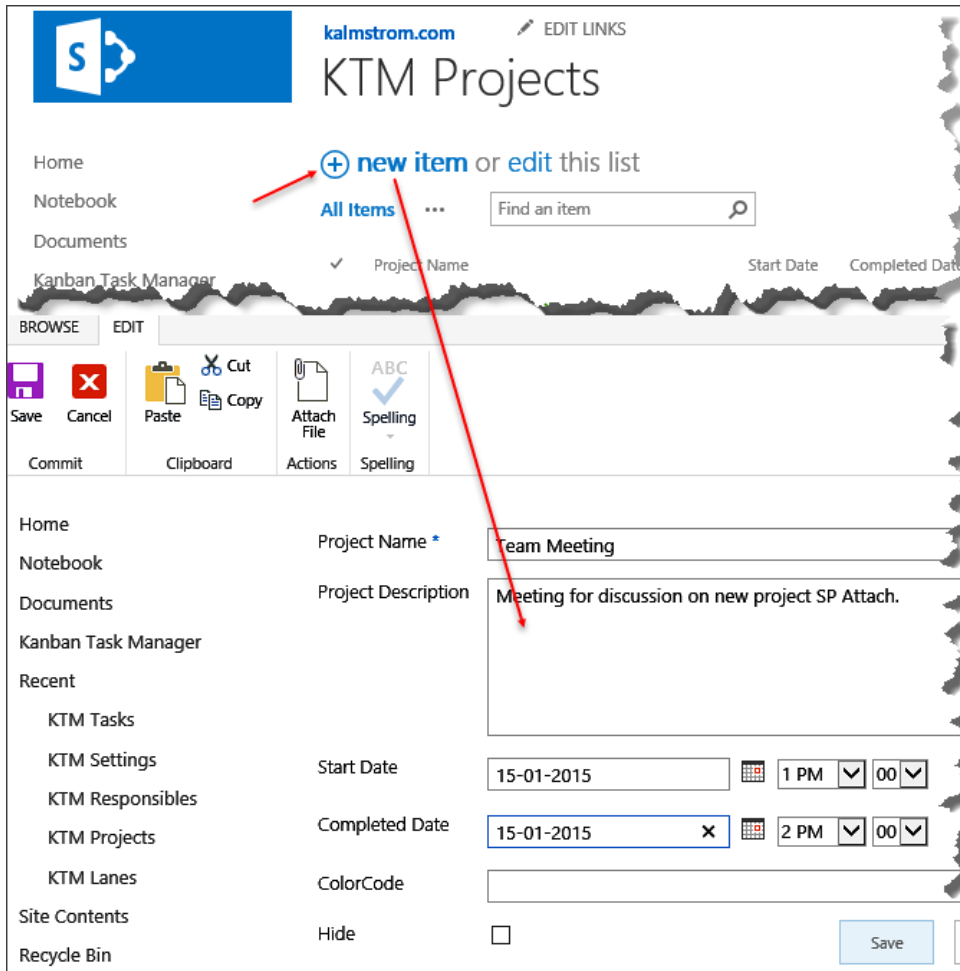
The *Kanban Task Manager* App Part supports attachments, videos and inline images, but attachments, videos and inline images are NOT supported in the Add-in.

6.3 LIST AND FIELD MODIFICATIONS

6.3.1 ADD ITEMS TO LISTS

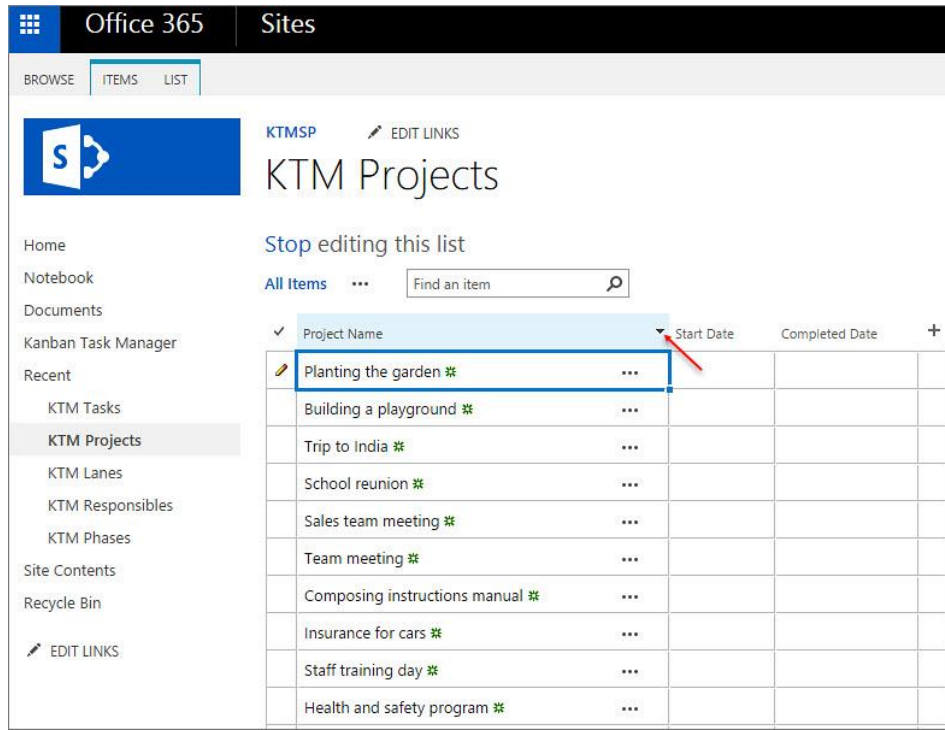
New projects, phases, responsables and lanes can be added to the lists in two ways, both standard SharePoint methods:

- **Standard View:** via the Add new item button. A new dialog opens, and you can fill out the details.



The screenshot shows the 'KTM Projects' list in SharePoint's Standard View. The top navigation bar includes 'Home', 'Notebook', 'Documents', and 'Kanban Task Manager'. The list title is 'KTM Projects' with an 'EDIT LINKS' option. Below the title, there is a '+ new item or edit this list' button, which is highlighted by a red arrow. The list view shows a table with columns: 'Project Name', 'Start Date', and 'Completed Date'. Below the table, there is a 'BROWSE' tab and an 'EDIT' tab. The 'EDIT' tab is active, showing a form for adding a new item. The form includes fields for 'Project Name *' (with the value 'Team Meeting'), 'Project Description' (with the value 'Meeting for discussion on new project SP Attach.'), 'Start Date' (with the value '15-01-2015' and a time dropdown set to '1 PM'), 'Completed Date' (with the value '15-01-2015' and a time dropdown set to '2 PM'), 'ColorCode', and a 'Hide' checkbox. A 'Save' button is at the bottom right of the form. A second red arrow points to the 'Project Description' field.

- **Quick Edit/ Datasheet view:** write or paste data into the cells.



Kanban Task Manager SharePoint Add-in uses the lookup method to fill its dropdowns, so entries will always be sorted and shown alphabetically in the dropdowns even if you don't add the items into the lists in alphabetical order.

6.3.2 ADD ITEMS TO DIALOGS

When you use the default *Kanban Task Manager SharePoint Add-in* settings, the phases and responsables are not fetched from lists. Instead they are fetched directly from the SharePoint settings.

6.3.2.1 ADD PHASE

By default *Kanban Task Manager SharePoint Add-in* uses the SharePoint task field 'Status'. To add a new value, and to edit or remove values, click on the 'Phases' link in the Configure page and edit in the dialog.

You may also go into the site settings of the task list you are using with *Kanban Task Manager SharePoint Add-in* ('KTM Tasks' by default) and choose Site Contents > KTM Tasks list > LIST tab > List Settings > Columns > Status.

6.3.2.2 ADD RESPONSIBLE

By default the responsible persons are fetched from the SharePoint accounts. When you create a new task and add a responsible person to it, this name will be automatically added to the Responsibles dialog if it is not already present there.

6.3.3 HIDE A PHASE, PROJECT OR RESPONSIBLE

By checking the Hide option for a phase, project or responsible item, you may hide that phase/project/responsible from the kanban board. It is suitable to hide phases like “Completed”, which you want to keep in the database but not display on the kanban board. Finished projects and responsables that are no longer active in the work group should also be hidden.

Hide an item by checking the Hide box in the list item or in the dialog.

Phases

Phase Name	Move closed tasks to this phase	Hide	Sequence	WIP	Delete
Not Started	☐	☐	0	0	✗
In Progress	☐	☐	0	0	✗
Completed	☐	☒	0	0	✗

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Add OK Cancel

Office 365 Sites

BROWSE EDIT

Save Cancel Paste Cut Copy Attach File Spelling

Commit Clipboard Actions Spelling

Home Notebook Documents Kanban Task Manager Recent

KTM Tasks KTM Projects KTM Lanes KTM Responsibles KTM Phases

Site Contents Recycle Bin

Phase Name * Finished

Phase Description

Hide ☒

Sequence 2

WIP 20

Move closed tasks to this phase ☐

Save Cancel

EDIT LINKS

Note that hidden projects and responsables are only hidden from the filter dropdowns. As *Kanban Task Manager SharePoint Add-in* uses standard list items, they cannot be hidden from

the dropdowns in the open tasks. Instead you can add a “Z” in front of the name so that these items show up last in the dropdown list.

6.3.4 WIP LIMITS

You can set WIP limits for the phases and lanes, so that users will have red warning text on phase and lane names when the number of tasks in a phase or lane exceeds the number defined in the settings.

Not Started (15)
In Progress (21)
Completed (25)

Phases
✕

Phase Name	Move closed tasks to this phase	Hide	Sequence	WIP	Delete
Not Started	☐	☐	0	20	✕
In Progress	☐	☐	0	10	✕
Completed	☐	☐	0	25	✕



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Add
OK
Cancel

Sales (28)

Send notices

Lorem ipsum

KTM
EDIT LINKS

KTM Lanes

Stop editing this list

All Items
...

Find an item

Lane Name	Sequence	WIP
Customer	1	10
Sales	2	20
Contracts	3	30
Legal	4	40
Fulfillment	5	50

6.3.5 CLOSE A TASK

When users click the Close button on the visualized task on the kanban board, the item will be either deleted or moved to a specified phase.

To move the tasks to a specified phase, check the option “Move closed task to this phase” for the phase to where the tasks should be moved when they are closed.

Book time at the ministry
 Lorem ipsum dolor sit amet, consectetur
 adipiscing elit. Maecenas porttitor congue
 massa. Fusce posuere, magna sed
 pulvinar ultricies, purus lectus malesuada
 libero, sit amet commodo magna eros
 quis urna. Nunc
 Insurance for cars

Arpeet Gujarati



Phases ✕

Phase Name	Move closed tasks to this phase	Hide	Sequence	WIP	Delete
Not Started	☐	☐	0	0	✕
In Progress	☐	☐	0	0	✕
Completed	☒	☐	0	0	✕
Deferred	☐	☐	0	0	✕
Waiting on someone else	☐	☐	0	0	✕

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 Add OK Cancel

Office 365 | Sites

BROWSE EDIT

Save Cancel Paste Cut Copy Attach File Spelling

Commit Clipboard Actions Spelling

Home Notebook Documents Kanban Task Manager Recent

KTM Tasks KTM Projects KTM Lanes KTM Responsibles KTM Phases

Site Contents Recycle Bin

EDIT LINKS

Phase Name *

Phase Description

Hide ☐

Sequence

WIP

Move closed tasks to this phase ☒

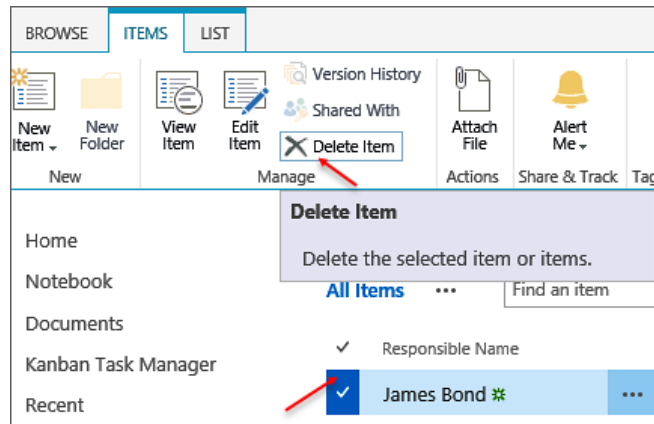
When the Close button is set to move tasks to a specified phase, tasks can instead be deleted via the tasks list or by using the X icon in the open task.

6.3.6 DELETE ITEMS

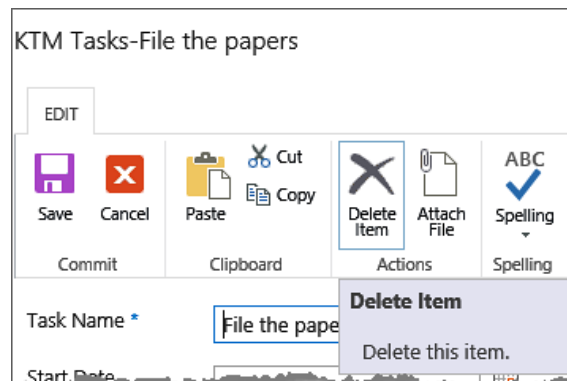
How you delete items depend on if they are stored in SharePoint lists or in *Kanban Task Manager* dialogs.

6.3.6.1 DELETE ITEMS IN A LIST

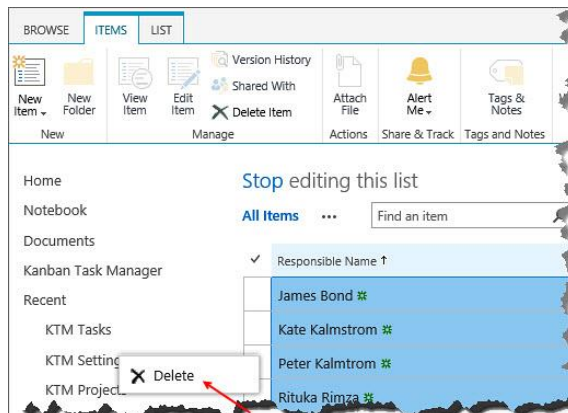
Delete items in the Standard View by selecting the item(s) and pressing the Delete Item button under the ITEMS tab in the ribbon.



When the item is open you can find a similar Delete button inside the open item.



In the Datasheet/Quick Edit view you can delete one or several rows by selecting them and right click.



6.3.7 DELETE ITEMS IN A DIALOG

In a dialog, use the red X to the right to delete an item.

Phases ✕

Phase Name	Move closed tasks to this phase	Hide	Sequence	WIP	Delete
Not Started	☐	☐	0	0	☒
In Progress	☐	☐	0	0	☒
Completed	☐	☐	0	0	☒
Deferred	☐	☐	0	0	☒
Waiting on someone else	☐	☐	0	0	☒

Kanban Task Manager SharePoint...
 Are you sure you want to delete the Phase ?

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6.3.8 DEFAULT VALUE

SharePoint does not show empty dropdowns. Instead the first alternative is shown as default in the dropdown. If you want to avoid unintended selections of the default alternative, you can create entries with the name " _Unassigned". Then this value will be shown by default when you create a new task (unless you have filtered for Project/Responsible, because then that value will be default instead).

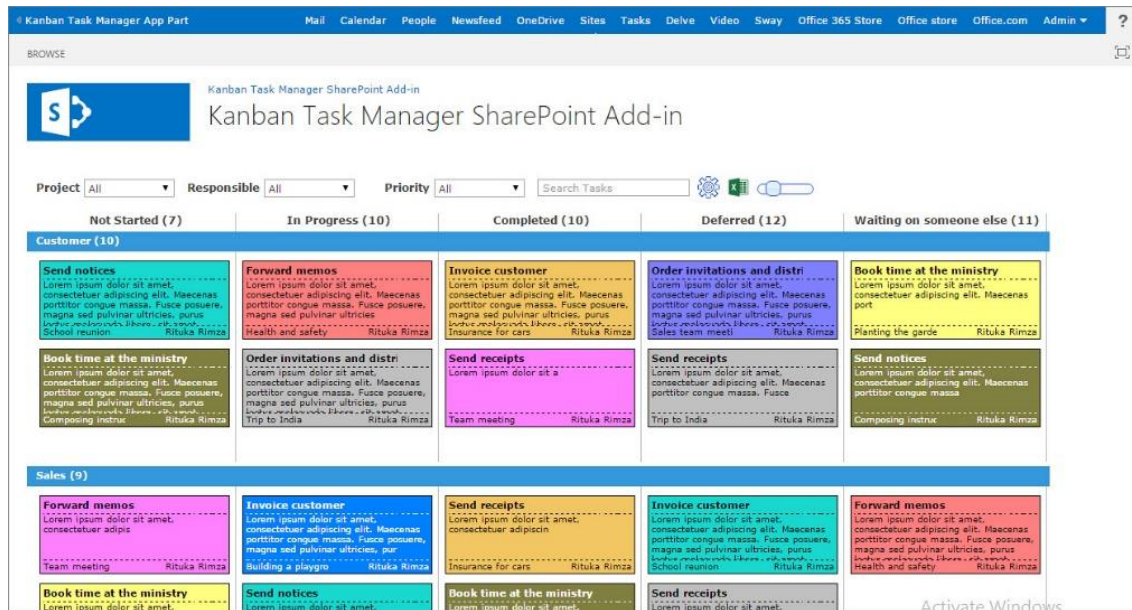
Note: the current user will automatically be selected as default when a new task is created.

7 USING KANBAN TASK MANAGER

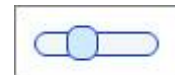
You can reach the *Kanban Task Manager SharePoint Add-in* kanban board by clicking on "Kanban Task Manager SharePoint Add-in" in the Site Content.

7.1 THE KANBAN BOARD

The tasks page (= the kanban board) shows all the tasks in the *Kanban Task Manager SharePoint Add-in* Tasks list. The tasks are grouped according to their phase, and by default all tasks are shown in the page. The kanban board may also have different lanes, where the tasks can be moved independently.



The kanban board may be zoomed in and out with the **zoom bar** at the top right. Drag the bar to the left when you want to see as many tasks as possible. Drag the bar to the right when you want to zoom into one or a few tasks.



You can also use the Ctrl key + the plus or minus key to zoom in and out on the kanban board, just like you do with any web pages. This method gives an even more expanded zoom range than the button.

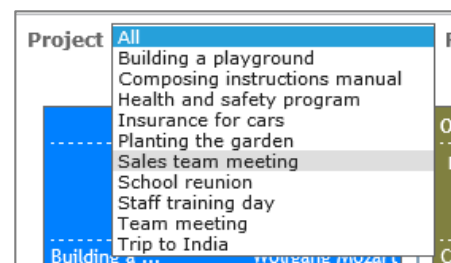
The filter options, search and phase names are locked, so that you still can see them when you scroll vertically.

7.2 FILTER TASKS

You may filter tasks by project, responsible and/or priority, and also by a custom parameter if this is enabled by the administrator.

When you select a value from the dropdowns in *Kanban Task Manager SharePoint Add-in*, the tasks for that value will be shown.

All the tasks will be shown when you select All.



7.3 SEARCH TASKS

The standard SharePoint search may be used with *Kanban Task Manager Sharepoint add-in*, but the application also has its own Search feature. Above the phases in the kanban board there is a search field, where you can search the subjects and bodies of all tasks.



Start writing the word or phrase you are looking for. *Kanban Task Manager SharePoint Add-in* will start searching immediately and show tasks with words that begin in the same way on the kanban board. The rest of the tasks will be hidden.

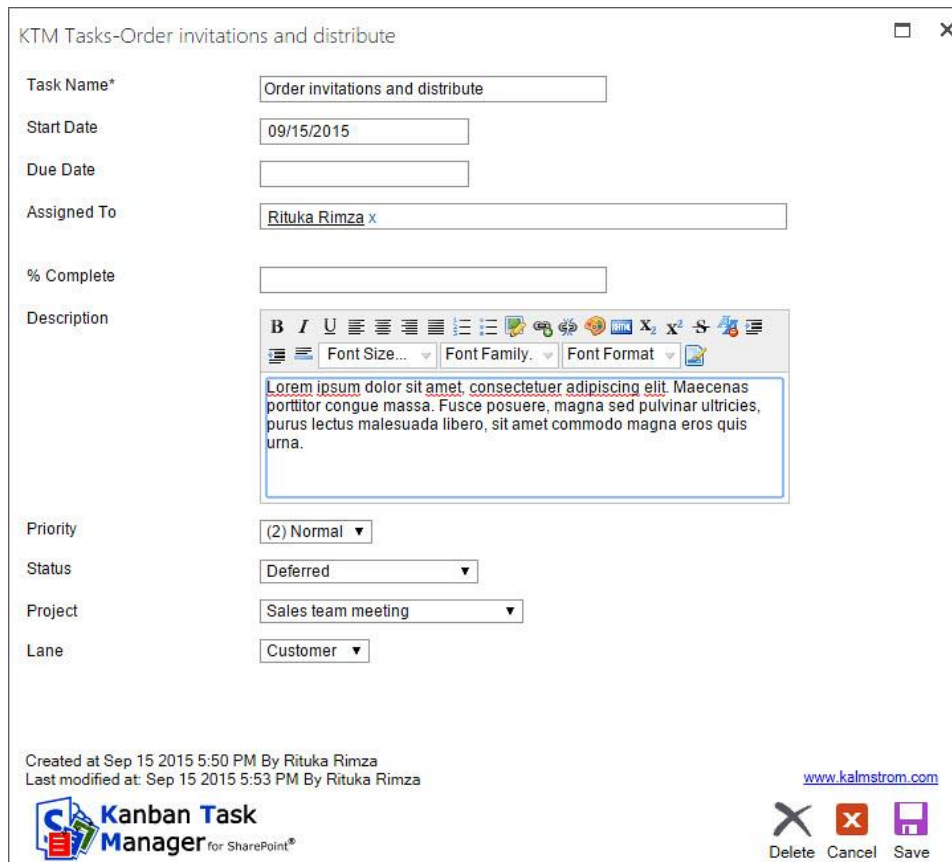
When you delete the text, the search filter is removed and all your tasks become visible again. In Internet Explorer you can also click on the x in the Search field to delete the text.

7.4 CREATE A NEW TASK

Double-click in a phase where you want to create the new task. That phase (and lane, if you use lanes) will be selected by default. If the view is filtered for project, responsible or priority that project/responsible/priority value will be the default one.

The task form looks a bit different depending on if you are using the *Kanban Task Manager Add-in* or the *Kanban Task Manager App Part*.

The Add-in task form



KTM Tasks-Order invitations and distribute

Task Name* Order invitations and distribute

Start Date 09/15/2015

Due Date

Assigned To Rituka Rimza x

% Complete

Description

Priority (2) Normal ▼

Status Deferred ▼

Project Sales team meeting ▼

Lane Customer ▼

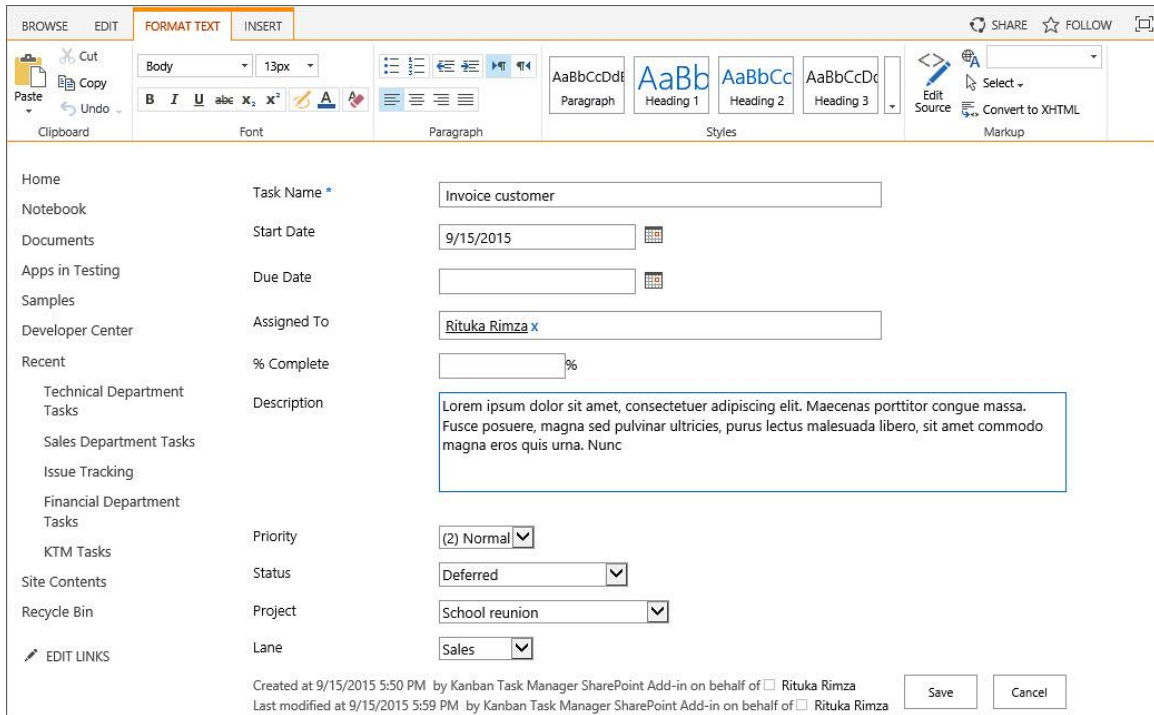
Created at Sep 15 2015 5:50 PM By Rituka Rimza
Last modified at: Sep 15 2015 5:53 PM By Rituka Rimza

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Delete Cancel Save

The App Part task form



7.4.1 DIFFERENCES

As you see from the form images above, the task Description field give different possibilities in the Add-in and the App Part. The App Part gives more options, but this means that if you add attachments to the task in the App Part, they will not be visible in the Add-in.

Everything you add to the task in the Add-in will show up in the App Part also.

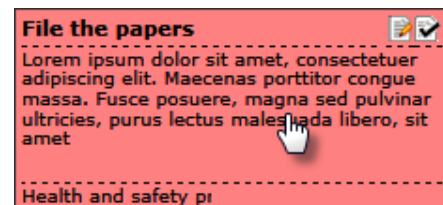
7.5 MOVE TASKS

To **drag** a task, within a phase, from one phase to another or from one lane to another, move the cursor over it. The cursor will then transform into a hand, and you can drag the task and drop it in the new place.

You can also move tasks within a lane by using the **CTRL** key + one of the **arrow** keys. In next version this will work between lanes also, just like drag and drop.

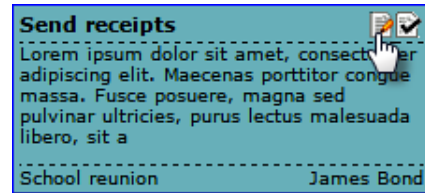
If you have a touch screen, you can move the tasks with a **finger**.

When you move the task to another phase or lane, the phase/lane info in the task will be changed automatically.



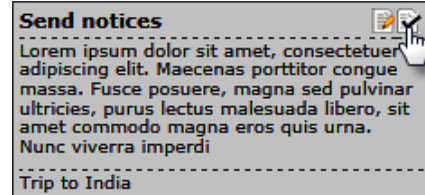
7.6 EDIT A TASK

When you focus on a task, the Edit icon on the top right corner of the task becomes visible. You can open the task in edit mode by either clicking the icon or by double-clicking on the task.



7.7 DELETE OR CLOSE A TASK

When you click the close button on the task, the item will be either deleted or moved to a phase specified by the administrator.



Tasks that are deleted will be moved to the site recycle bin, where they are usually kept for 30 days, making it easy to restore deleted tasks.

7.8 SEE MORE TEXT

When you right click a task, a details pane that shows more of the text than what is visible on the kanban board will be shown at the bottom of the screen in a details pane.

The screenshot shows the Kanban Task Manager SharePoint Add-in interface. At the top, there's a header with the SharePoint logo and the title 'Kanban Task Manager SharePoint Add-in'. Below the header, there are filters for Project, Responsible, and Priority, along with a search bar and a settings icon. The main area is a Kanban board with columns: Not Started (7), In Progress (10), Completed (10), Deferred (12), and Waiting on someone else (12). The board is divided into two sections: Customer (10) and Sales (10). Each section contains several task cards with titles like 'Send notices', 'Forward memos', 'Invoice customer', 'Order invitations and di', 'Book time at the minist', 'Send receipts', and 'Sweden Visit'. A red arrow points from a task card in the 'In Progress' column to a details pane at the bottom of the screen. The details pane shows the full text of the selected task: 'Invoice customer' followed by a long paragraph of Lorem Ipsum text.

When you have already opened the details pane by right clicking on a task, you can select another task by either left or right click to see its details in the pane. You can also use the arrow keys to move between tasks.

Right click in an empty space to close the details pane.

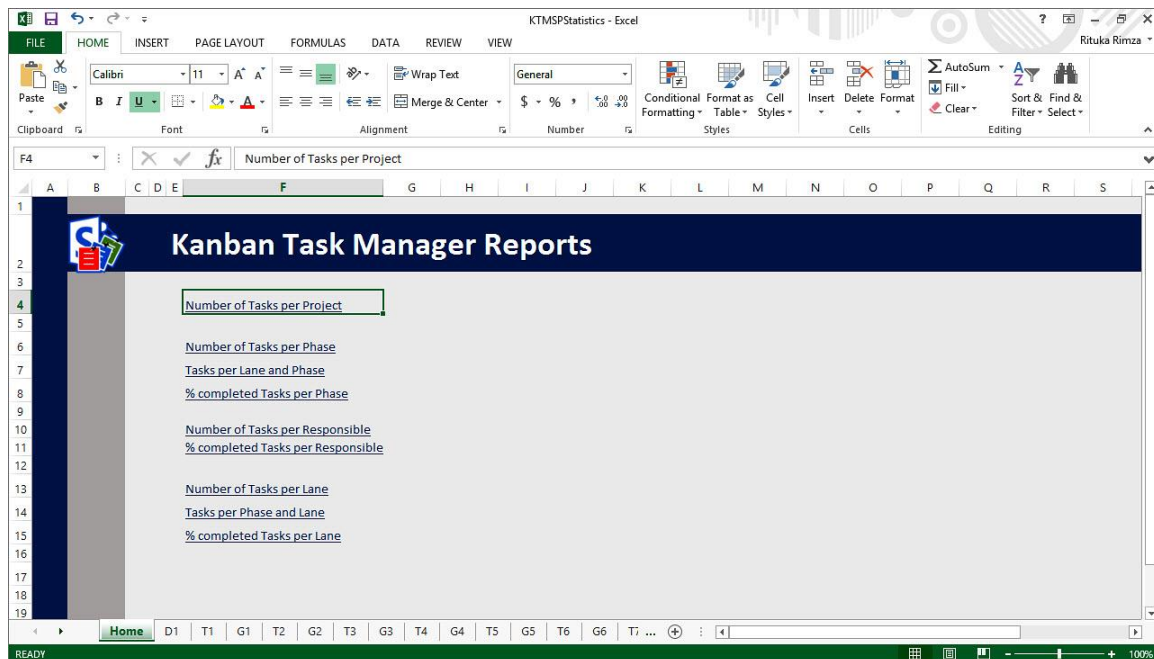
8 STATISTICS

Kanban Task Manager SharePoint Add-in data can be studied in different Excel reports. You can reach the statistics by pressing the Excel button on the kanban board.



Each time you run the *Kanban Task Manager SharePoint Add-in* statistics application, a new report will be generated with the updated data.

The statistics reports are generated at an kalmstrom.com service on Microsoft Azure, and when the reports file has been created you will be asked to download it.



Kanban Task Manager SharePoint Add-in offers several Excel reports:

- Number of Tasks per Project
- Number of Tasks per Phase
- Tasks per Lane and Phase
- % completed Tasks per Phase
- Number of Tasks per Responsible
- % completed Tasks per Responsible

When swim lanes are used, there are three additional default reports:

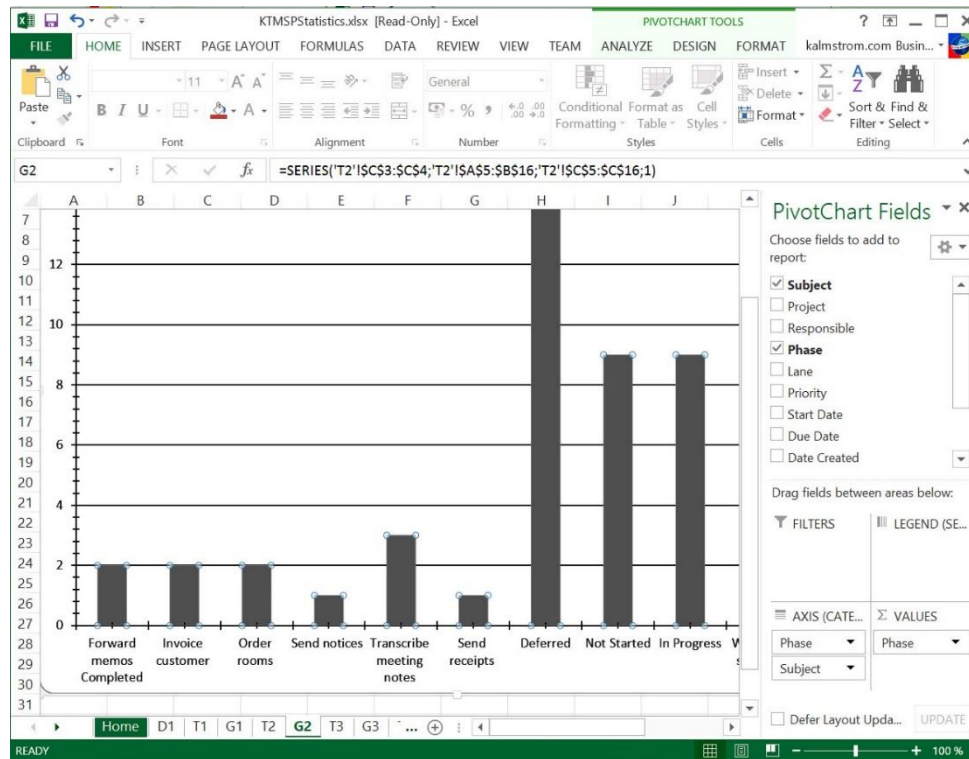
- Number of Tasks per Lane
- Tasks per Phase and Lane
- % completed Tasks per Lane

When a custom parameter has been added via the Extra field feature in the settings, there will be one more report that shows the number of tasks for each value of the custom parameter.

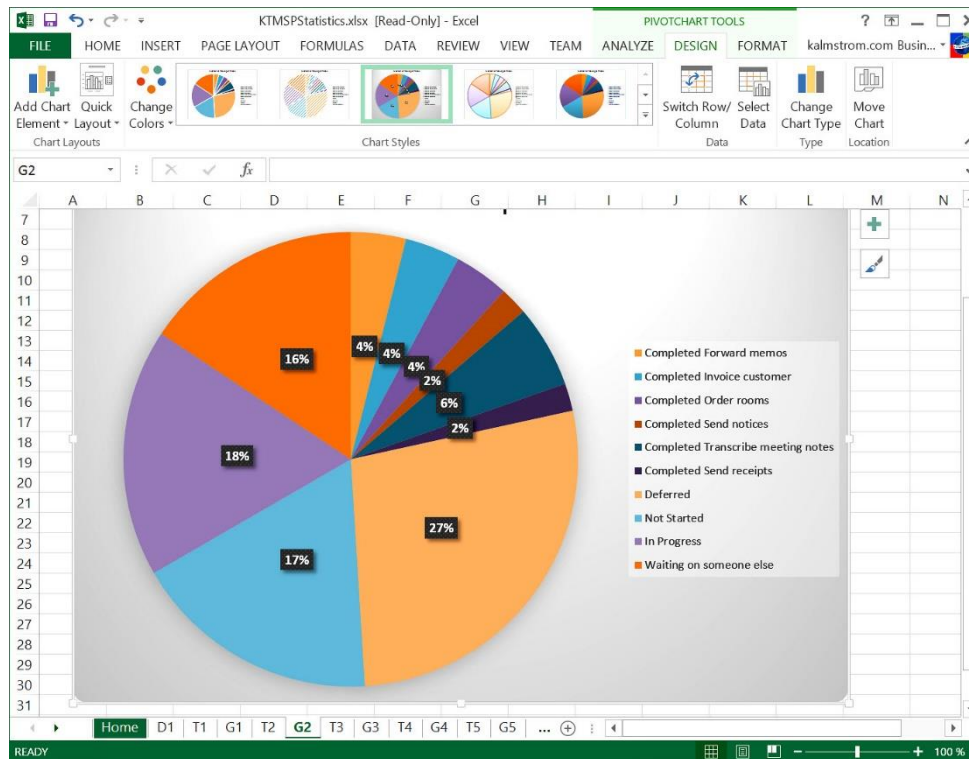
The different reports can be reached via the links on the Excel homepage or via the tabs at the bottom of the sheet.

Each report is shown as a pivot table and as a chart. All standard Excel features can be used with these reports. To learn more about Excel, refer to [the kalmstrom.com Tips section](http://www.kalmstrom.com/Tips).

Phase	Subject	Total
Completed	Forward memos	2
Completed	Invoice customer	2
Completed	Order rooms	2
Completed	Send notices	1
Completed	Transcribe meeting notes	3
Completed	Send receipts	1
Deferred		14
Not Started		9
In Progress		9
Waiting on someone else		8
Grand Total		51



Change the charts as you like with the Excel tools.



Under the first tab, D1, you can find all info about the tasks.

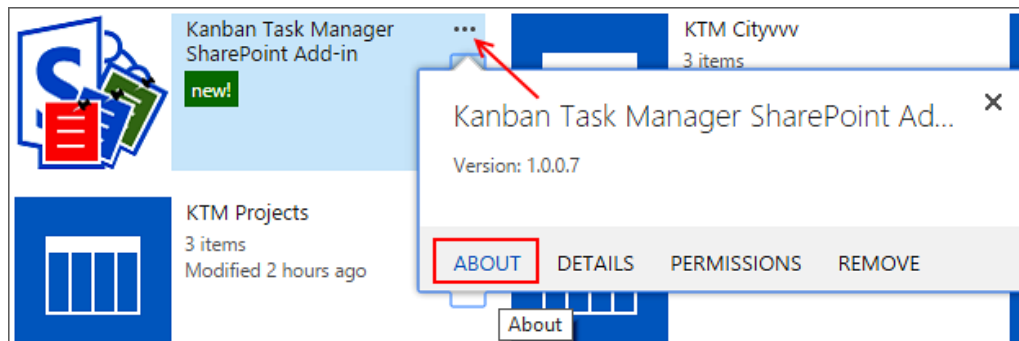
1	Subject	Project	Responsible	Phase	Lane	Priority	Start Date	Due Date	Date Created	% co	Created by
2	Select samples before the meeting	Planting the garden	Rituka Rimza	Not Started	Sales	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
3	Invoice customer	Sales team meeting	Rituka Rimza	Not Started	Customer	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
4	Book time at the ministry	Health and safety program	Rituka Rimza	Not Started	Customer	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
5	Order rooms	Staff training day	Rituka Rimza	Not Started	Legal	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
6	Invoice customer	Team meeting	Rituka Rimza	Not Started	Sales	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
7	Send receipts	Trip to India	Rituka Rimza	Not Started	Sales	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
8	Order rooms	Staff training day	Rituka Rimza	Not Started	Sales	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
9	Order invitations and distribute	Planting the garden	Rituka Rimza	Not Started	Contracts	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
10	Book time at the ministry	Staff training day	Rituka Rimza	Not Started	Sales	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
11	Send notices	Building a playground	Rituka Rimza	Not Started	Fulfillment	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
12	Invoice customer	Building a playground	Rituka Rimza	Not Started	Fulfillment	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
13	Send receipts	School reunion	Rituka Rimza	Not Started	Fulfillment	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
14	Select samples before the meeting	Planting the garden	Rituka Rimza	Not Started	Sales	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
15	Forward memos	Health and safety program	Rituka Rimza	Not Started	Fulfillment	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
16	Book time at the ministry	Team meeting	Rituka Rimza	Not Started	Contracts	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
17	Forward memos	Health and safety program	Rituka Rimza	Not Started	Legal	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
18	Forward memos	Team meeting	Rituka Rimza	Not Started	Legal	(2) Normal	7/24/2015 12:48	1/31/4501 18:30	7/24/2015 12:48	0.00	Rituka Rimza
19	Transcribe meeting notes	Sales team meeting	Rituka Rimza	Not Started	Legal	(2) Normal	7/24/2015 12:49	1/31/4501 18:30	7/24/2015 12:49	0.00	Rituka Rimza
20	Send notices	Staff training day	Rituka Rimza	Not Started	Contracts	(2) Normal	7/24/2015 12:49	1/31/4501 18:30	7/24/2015 12:49	0.00	Rituka Rimza
21	Order invitations and distribute	Sales team meeting	Rituka Rimza	Not Started	Fulfillment	(2) Normal	7/24/2015 12:49	1/31/4501 18:30	7/24/2015 12:49	0.00	Rituka Rimza
22	Transcribe meeting notes	Staff training day	Rituka Rimza	Not Started	Sales	(2) Normal	7/24/2015 12:49	1/31/4501 18:30	7/24/2015 12:49	0.00	Rituka Rimza
23	Send notices	Planting the garden	Rituka Rimza	Not Started	Sales	(2) Normal	7/24/2015 12:49	1/31/4501 18:30	7/24/2015 12:49	0.00	Rituka Rimza

9 UPGRADE

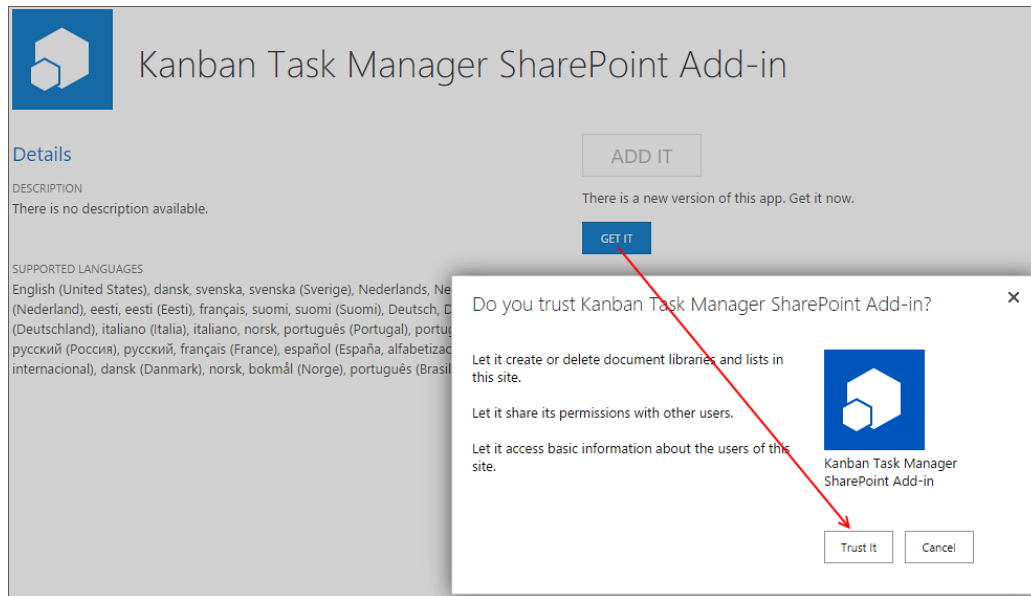
When you have installed *Kanban Task Manager SharePoint Add-In* via SharePoint Store, you will get a notification when a new version is available. Upgrades are free, and we recommend that you always upgrade to the latest version.

To upgrade the Add-in catalog, upload the new version of *Kanban Task Manager SharePoint Add-in* to the Add-in catalog and over-write the old version.

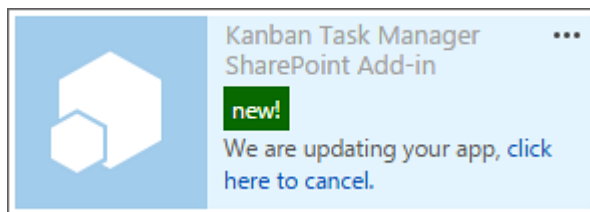
A notification that an update is available appears next to the add-in in the Site Contents of every site where it is installed. To upgrade, right click on the ellipses (...) and select ABOUT.



Information about new version will be shown in a new window. Click on the GET IT button and then on Trust It.



The Site Contents page will open again with the notice 'We are updating your app' on the *Kanban Task Manager SharePoint Add-in* tile.



The new version of the *Kanban Task Manager* Add-in will find and use all your old list items.

10 REGISTRATION AND TRIAL INFO

You may evaluate *Kanban Task Manager* without cost and with full functionality for 30 days.

If you want to continue using *Kanban Task Manager* after the trial period, you must subscribe to the solution. We supply a Premium version, which does not require registration at all, but organizations who select the Minimum or Medium Subscription must register their installations of *Kanban Task Manager SharePoint Add-in*.

Minimum and Medium Subscribers will be given a registration key which allows the organization to continue using *Kanban Task Manager SharePoint Add-in* for the duration of the subscription.



To register, open the Configure page by clicking on the settings icon at the top, near the search field.

 **Kanban Task Manager** for SharePoint®

www.kalmstrom.com

Press the License button, and a registration dialog will open. Enter an e-mail address with your company domain and the registration key you have received from kalmstrom.com. Then click on Registration.

Kanban Task Manager SharePoint Add-in



Please enter your e-mail address and your registration key for Kanban Task Manager and click Registration. You need to be connected to the Internet for this to work.

This version will function 27 more days.

E-mail

Registration key

(Format: XXXXX-XXXX-XXXX-XXXX-XXXX)

www.kalmstrom.com

 **Kanban Task Manager** for SharePoint®

The registration must be done once on every site where *Kanban Task Manager SharePoint Add-in* is used. In the future we plan to give our customers an easier way to register all installations.

The registration key will continue to work as long as the organization is a kalmstrom.com Subscriber.

11 SUBSCRIPTION

Kanban Task Manager SharePoint Add-in is licensed with a subscription. There are three subscription levels, Minimum, Medium and Premium. Support, upgrades and an unlimited number of users within the subscribing organization are included in all levels. Refer to the [Kanban Task Manager Subscription page](#).

12 CONTACT

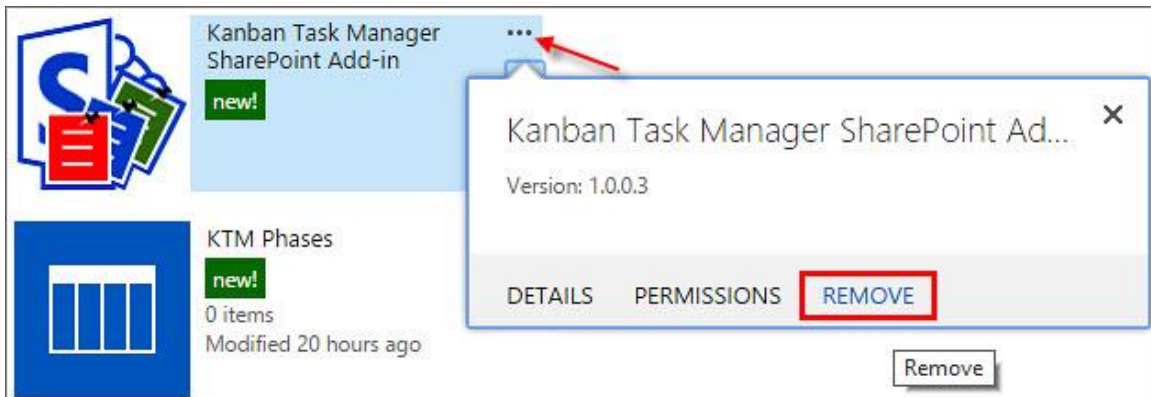
If you have any kind of problem or questions about *Kanban Task Manager*, there are several ways of contacting us:

E-mail	support@kalmstrom.com – Technical issues
	sales@kalmstrom.com – Subscription and general issues
	finance@kalmstrom.com – Invoices, payments
Telephone	+46 739 206 106 Within USA: (800) 518-4155
Online chat	http://www.kalmstrom.com

13 REMOVE KANBAN TASK MANAGER SHAREPOINT ADD-IN

Should *Kanban Task Manager SharePoint Add-in* not be used anymore, you can remove it.

To remove go to the **Site Contents** and find *Kanban Task Manager SharePoint Add-in*. Right click on the ellipses(...)and select **REMOVE** from the context menu. You might also want to remove some or all of the *Kanban Task Manager* lists.



14 MORE SHAREPOINT TIPS

You surely have noticed that *Kanban Task Manager SharePoint Add-in* uses what is best in SharePoint, and that the *Kanban Task Manager* lists and pages may be handled just like other SharePoint lists and pages. For tips on SharePoint usage in general, please refer to the [Tips section of the kalmstrom.com website](#).